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Form 990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0052

2009

For calendar year 2009, or tax year beginning 01-01-2009 , and ending 12-31-2009

G

Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation THE BRADLEY FOUNDATION		A Employer identification number 33-0771070	
	Number and street (or P O box number if mail is not delivered to street address) 1672 Main Street		Room/suite	B Telephone number (see page 10 of the instructions) (760) 789-2235
	City or town, state, and ZIP code Ramona, CA 92065			

H Check type of organization

☒ Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust

☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16)

\$ 3,992,488

J Accounting method

☒ Cash

☐ Accrual

☐ Other (specify) _ (Part I, column (d) must be on cash basis.)

E If private foundation status was terminated under section 507(b)(1)(A), check here

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here

C If exemption application is pending, check here

D 1. Foreign organizations, check here

2. Foreign organizations meeting the 85% test, check here and attach computation

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	109,746			
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	168	168	168	
	4 Dividends and interest from securities.	57,406	57,406	57,406	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	4,877			
	b Gross sales price for all assets on line 6a _____ 1,183,466				
	7 Capital gain net income (from Part IV, line 2)		4,877		
	8 Net short-term capital gain			29,300	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	172,197	62,451	86,874	
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	90			90
	b Accounting fees (attach schedule)	1,669			1,669
	c Other professional fees (attach schedule)	13,810	13,810	13,810	
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	929			30
	19 Depreciation (attach schedule) and depletion	0			
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	13,782			13,782
	24 Total operating and administrative expenses. Add lines 13 through 23	30,280	13,810	13,810	15,571
	25 Contributions, gifts, grants paid	262,309			262,309
	26 Total expenses and disbursements. Add lines 24 and 25	292,589	13,810	13,810	277,880
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-120,392			
	b Net investment income (if negative, enter -0-)		48,641		
	c Adjusted net income (if negative, enter -0-)			73,064	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)			Beginning of year	End of year	
					(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing					
	2	Savings and temporary cash investments			175,681	629,823	629,823
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____					
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____					
	5	Grants receivable					
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)					
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____					
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges					
	10a	Investments—U S and state government obligations (attach schedule)			689,944	 494,396	484,194
	b	Investments—corporate stock (attach schedule)			3,343,918	 2,964,925	2,577,874
	c	Investments—corporate bonds (attach schedule)					
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
	12	Investments—mortgage loans					
	13	Investments—other (attach schedule)			937	 944	797
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
Liabilities	15	Other assets (describe ▶ _____)			299,800	 299,800	 299,800
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)			4,510,280	4,389,888	3,992,488
	17	Accounts payable and accrued expenses					
	18	Grants payable					
	19	Deferred revenue					
	20	Loans from officers, directors, trustees, and other disqualified persons					
	21	Mortgages and other notes payable (attach schedule)					
Net Assets or Fund Balances	22	Other liabilities (describe ▶ _____)					
	23	Total liabilities (add lines 17 through 22)				0	
		Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted					
	25	Temporarily restricted					
	26	Permanently restricted					
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds					
	28	Paid-in or capital surplus, or land, bldg , and equipment fund					
	29	Retained earnings, accumulated income, endowment, or other funds			4,510,280	4,389,888	
	30	Total net assets or fund balances (see page 17 of the instructions)			4,510,280	4,389,888	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)			4,510,280	4,389,888	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	4,510,280
2	Enter amount from Part I, line 27a	2	-120,392
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	4,389,888
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	4,389,888

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				
(e) Gross sales price		(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	See Additional Data Table			
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(i) F M V as of 12/31/69		(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a	See Additional Data Table			
b				
c				
d				
e				
2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			24,877
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8			329,300

Part V

Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☒ Yes ☐ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries			
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008			
2007			
2006			
2005			
2004			
2 Total of line 1, column (d).			2
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.			4
5 Multiply line 4 by line 3.			5
6 Enter 1% of net investment income (1% of Part I, line 27b).			6
7 Add lines 5 and 6.			7
8 Enter qualifying distributions from Part XII, line 4.			8
If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18			

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)			
1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	973
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	
3 Add lines 1 and 2.		3	973
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	973
6 Credits/Payments			
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	1,200
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7 Total credits and payments Add lines 6a through 6d.		7	1,200
8 Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	227
11 Enter the amount of line 10 to be Credited to 2010 estimated tax 227 Refunded		11	

Part VII-A Statements Regarding Activities				
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?			Yes	No
		1a		No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?		1b		No
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.				
c Did the foundation file Form 1120-POL for this year?.		1c		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ (2) On foundation managers \$				
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$				
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?		2		No
If "Yes," attach a detailed description of the activities.				
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?.		4a		No
b If "Yes," has it filed a tax return on Form 990-T for this year?.		4b		No
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		No
If "Yes," attach the statement required by General Instruction T.				
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		6	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV		7	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) CA				
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .		8b	Yes	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV		9		No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		10	Yes	

Part VII-A

Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address  www.bradleyfoundationscholars.org	13	Yes	
14	The books are in care of  BARBARA TEETS Telephone no  (760) 789-2235 Located at  1672 MAIN ST E-364 RAMONA CA ZIP+4  92065			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here  ☐ and enter the amount of tax-exempt interest received or accrued during the year.		15	

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?. ☐ Organizations relying on a current notice regarding disaster assistance check here.  ☐	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?. ☐	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?. ☐ Yes ☒ No If "Yes," list the years  20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions). ☐	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here  20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.</i>). ☐	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to

(1)

Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

Yes

No

(2)

Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

Yes

No

(3)

Provide a grant to an individual for travel, study, or other similar purposes?

Yes

No

(4)

Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions).

Yes

No

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

Yes

No

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

Yes

No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

Yes

No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes " to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

Yes

No

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

5b

No

6b

No

7b

No

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
BARBARA TEETS	Director	0		
1672 Main Street E-364 RAMONA, CA 92065	10 00			
WILLIAM R BRADLEY	President	0		
1672 Main Street E-364 RAMONA, CA 92065	0 00			

2

Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total

number of other employees paid over \$50,000.

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Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3.	

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	2,624,215
b	Average of monthly cash balances.	1b	214,865
c	Fair market value of all other assets (see page 24 of the instructions).	1c	299,800
d	Total (add lines 1a, b, and c).	1d	3,138,880
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	3,138,880
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	47,083
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,091,797
6	Minimum investment return. Enter 5% of line 5.	6	154,590

Part XI

Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	154,590
2a	Tax on investment income for 2009 from Part VI, line 5.	2a	973
b	Income tax for 2009 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	973
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	153,617
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	153,617
6	Deduction from distributable amount (see page 25 of the instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	153,617

Part XII

Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	277,880
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	277,880
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	277,880
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see page 26 of the instructions)

		(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1		Distributable amount for 2009 from Part XI, line 7			
2		Undistributed income, if any, as of the end of 2008			
a		Enter amount for 2008 only.			
b		Total for prior years 20____, 20____, 20____			
3		Excess distributions carryover, if any, to 2009			
a		From 2004.			
b		From 2005.			
c		From 2006.			
d		From 2007.			
e		From 2008.			
f		Total of lines 3a through e.			
4		Qualifying distributions for 2009 from Part XII, line 4			
a		Applied to 2008, but not more than line 2a			
b		Applied to undistributed income of prior years (Election required—see page 26 of the instructions)			
c		Treated as distributions out of corpus (Election required—see page 26 of the instructions).			
d		Applied to 2009 distributable amount.			
e		Remaining amount distributed out of corpus			
5		Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)			
6		Enter the net total of each column as indicated below:			
a		Corpus Add lines 3f, 4c, and 4e Subtract line 5			
b		Prior years' undistributed income Subtract line 4b from line 2b.			
c		Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.			
d		Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions.			
e		Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions.			
f		Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010.			
7		Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions).			
8		Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions).			
9		Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a.			
10		Analysis of line 9			
a		Excess from 2005.			
b		Excess from 2006.			
c		Excess from 2007.			
d		Excess from 2008.			
e		Excess from 2009.			

Part XIV

Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling.

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2009	(b) 2008	(c) 2007	(d) 2006	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed					
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XV

Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 of the instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

WILLIAM R BRADLEY

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

The name, address, and telephone number of the person to whom applications should be addressed

See Additional Data Table

b

The form in which applications should be submitted and information and materials they should include

See Additional Data Table

c

Any submission deadlines

See Additional Data Table

d

Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

See Additional Data Table

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			▶ 3a	262,309
b Approved for future payment				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Form **990-PF** (2009)

1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash.	1a(1)		No
	(2) Other assets.	1a(2)		No
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
	(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
	(3) Rental of facilities, equipment, or other assets.	1b(3)		No
	(4) Reimbursement arrangements.	1b(4)		No
	(5) Loans or loan guarantees.	1b(5)		No
	(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

*****	2010-05-13	*****
Signature of officer or trustee	Date	Title

Paid Preparer's Use Only	Preparer's Signature  STEVEN STROLL	Date	Check if self-employed 	Preparer's identifying number (see Signature on page 30 of the instructions)
	Firm's name (or yours if self-employed), address, and ZIP code	Steven Stroll CPA APC 4929 Wilshire Blvd Ste 388 Los Angeles, CA 90010	EIN 	Phone no (323) 936-2777

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF.	OMB No 1545-0047
		2009

Name of organization THE BRADLEY FOUNDATION	Employer identification number 33-0771070
---	---

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization ☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation ☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation ☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule—

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor Complete Parts I and II

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ, that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or 990-EZ, that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or 990-EZ, that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc , purposes, but these contributions did not aggregate to more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc , contributions of \$5,000 or more during the year ▶ \$

Caution. An Organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer “No” on Part IV, line 2 of its Form 990, or check the box in the heading of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization THE BRADLEY FOUNDATION	Employer identification number 33-0771070
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Part I Contributors (see Instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
<u>2</u>	APACHE FOUNDATION 2000 POST OAK BLVD HOUSTON, TX 77056 	\$ 101,056	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	PHIL AND MARGIE WARD PO BOX 3332 RANCHO SANTA FE, CA 92067 	\$ 8,690	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
—		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
_____	_____ _____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
_____		\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
_____	_____ _____ _____ _____	\$ _____	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Name of organization THE BRADLEY FOUNDATION	Employer identification number 33-0771070
--	--

Part II Noncash Property (see Instructions)			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____

Name of organization THE BRADLEY FOUNDATION	Employer identification number 33-0771070
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Part III

Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year. (Complete columns (a) through (e) and the following line entry)

For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **\$1,000 or less** for the year (Enter this information once See instructions) ► \$

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
—			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
—			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
—			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
—			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	

Additional Data

Software ID: 09000047

Software Version:

EIN: 33-0771070

Name: THE BRADLEY FOUNDATION

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
7412 SH WATTS WATER TECH NC	P	2008-01-04	2009-11-10
6682 SH NUTRISYSTEM INC	P	2008-02-26	2009-11-11
6682 SH NUTRISYSTEM INC	P	2007-10-05	2009-11-11
7267 442 SH DREYFUS INTERMEDIATE TERM INCOME FUND	P	2008-01-29	2009-07-28
7570 023 SH DREYFUS INTERMEDIATE TERM INCOME FUND	P	2008-01-29	2009-01-05
9184 SH DOW CHEMICAL COMPANY	P	2008-10-14	2009-09-22
2861 SH BANK OF AMERICA CORP	P	2009-01-28	2009-11-10
1574 329 SH BANK OF AMERICA CORP	P	2008-10-28	2009-11-10
1286 672 SH BANK OF AMERICA CORP	P	2008-10-15	2009-11-10
1093 SH ARKANSAS BEST CORP DEL	P	2008-10-28	2009-08-24
2697 SH ARKANSAS BEST CORP DEL	P	2008-10-14	2009-08-24

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
226,787		212,599	14,188
151,011		104,123	46,888
151,011		217,313	-66,302
100,000		106,613	-6,613
100,000		111,052	-11,052
245,651		237,860	7,791
45,767		21,358	24,409
25,184		28,411	-3,227
20,583		29,940	-9,357
33,878		28,422	5,456
83,594		80,898	2,696

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			14,188
			46,888
			-66,302
			-6,613
			-11,052
			7,791
			24,409
			-3,227
			-9,357
			5,456
			2,696

Form 990PF Part XV Line 2a - 2d - Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

a The name, address, and telephone number of the person to whom applications should be addressed THE BRADLEY FOUNDATION 1672 MAIN STREET SUITE E-364 RAMONA, CA 92065 (760) 789-2235
b The form in which applications should be submitted and information and materials they should include Students should return a completed Scholarship Application Form, Personal Statement and OUTLINE OF ACADEMIC EXPENSES to The Bradley Foundation THESE FORMS WILL BE MAILED TO APPLICANTS UPON REQUEST OR CAN BE DOWNLOADED FROM THE FOUNDATION'S WEB SITE www.bradleyfoundationscholars.org/applications.html Submit a course/curriculum outlining requirements for completion of study to The Bradley Foundation A high school diploma or equivalent such as a General Educational Development Test (GED) or the California High School Equivalency Certificate must be provided to The Bradley Foundation Scholarship Reference Form and Scholarship Reference Statement from at least TWO administrators, teachers, or counselors who will be recommending that student for the scholarship should be submitted directly to The Bradley Foundation
c Any submission deadlines period 1 deadline is oct 15, period 2 deadline is feb 28
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors 1 Applicants must be enrolled as student in an accredited vocational, trade school or recognized agency of vocational training 2 Applicants must be United States Citizens or have permanent residency status 3 Applicants must be recommended by an administrator, teacher, or counselor 4 Applicants must complete the Student Scholarship Application form 5 Applicants must submit an transcript of grades or course completion statement

a The name, address, and telephone number of the person to whom applications should be addressed THE BRADLEY FOUNDATION 1672 MAIN STREET SUITE E-364 RAMONA, CA 92065 (760) 789-2235
b The form in which applications should be submitted and information and materials they should include Students should return a completed Scholarship Application Form, Parent Statement, Personal Statement (if applicant is 11-18 years of age) and OUTLINE OF ACADEMIC EXPENSES to The Bradley Foundation THESE FORMS WILL BE MAILED TO APPLICANTS UPON REQUEST OR CAN BE DOWNLOADED FROM THE FOUNDATION'S WEB SITE www.bradleyfoundationscholars.org/applications.html Grammar school or high school must mail sealed official transcript to The Bradley Foundation Scholarship Reference Form and Scholarship Reference Statement from at least TWO administrators, teachers, or counselors who will be recommending that student for the scholarship should be submitted directly to The Bradley Foundation
c Any submission deadlines period 1 deadline is oct 15, period 2 deadline is feb 28
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors 1 Applicants must be enrolled as full-time student in a grammar school (grades K-8) or a high school (grades 9-12) and must be in the age range of 5-18 years of age 2 Applicants must be United States Citizens or have permanent residency status 3 Applicants must be recommended by an administrator, teacher, or counselor 4 Applicants must complete the Student Scholarship Application form 5 Applicants must submit a transcript of grades or course completion statement

a The name, address, and telephone number of the person to whom applications should be addressed THE BRADLEY FOUNDATION 1672 MAIN STREET SUITE E-364 RAMONA, CA 92065 (760) 789-2235
b The form in which applications should be submitted and information and materials they should include Students should return a completed Scholarship Application Form, Personal Statement and OUTLINE OF ACADEMIC EXPENSES to The Bradley Foundation THESE FORMS WILL BE MAILED TO APPLICANTS UPON REQUEST OR CAN BE DOWNLOADED FROM THE FOUNDATION'S WEB SITE www.bradleyfoundationscholars.org/applications.html Academic institution must mail sealed official transcript to The Bradley Foundation Scholarship Reference Form and Scholarship Reference Statement from at least TWO administrators, teachers, or counselors who will be recommending that student for the scholarship should be submitted directly to The Bradley Foundation
c Any submission deadlines Opening Date is may 15th Application Deadline is July 15th
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors 1 Applicants must be enrolled as full-time student in accredited college 2 Applicants must be United States Citizens or have permanent residency status 3 Applicants must be recommended by an administrator, teacher, or counselor 4 Applicants must have a cumulative Grade Point Average of 2.5 or better 5 Applicants must complete the Student Scholarship Application form 6 Applicants must submit an Official College Transcript

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
University of California Santa BarbUC Santa Barbara SANTA BARBARA,CA 93106	N/A	GOV'T	TO PROVIDE FUNDING FOR THE DAVIDSON LIBRARY'S VIETNAM MAP COLLECTION	45,000
HANSON LANE ELEMENTARY1825 Hanson Lane Ramona,CA 92065	N/A	GOV'T	TO PROVIDE ACADEMIC GROWTH THROUGH AN EDUCATIONAL FIELD TRIP	1,100
Citizens United Foundation1006 Pennsylvania Ave SE WASHINGTON,DC 20003	N/A	PUBLIC	To PROMOTE AWARENESS about public policy issues related to traditional American values	4,000
AMERICAN DIABETES ASSOCIATION225 Broadway 1530 SAN DIEGO,CA 92101	N/A	PUBLIC	to support research efforts and help provide services to people with diabetes	10,000
Aztec Athletic Foundation5500 Campanile Drive SAN DIEGO,CA 92182	N/A	PUBLIC	TO PROVIDE SUPPORT FOR THE SAN DIEGO STATE UNIVERSITY'S GOLF TEAM	709
The Bookman4275 37th Street SAN DIEGO,CA 92105	N/A	PUBLIC	to FUND BOOK DONATIONS TO THE underprivileged and to other charitable groups	3,000
SD Youth Community Services3255 Wing Street SAN DIEGO,CA 92110	N/A	PUBLIC	to PROVIDE FUNDING FOR SOCIAL services for abused and neglected children	5,000
Junior Seau Foundation8787 Complex Drive Suite 200 SAN DIEGO,CA 92123	N/A	PUBLIC	to PROVIDE SCHOLARSHIP GRANTSFOR COLLEGE STUDENTS	10,000
Julie Wyatt13850 Comice Ct CHICO,CA 95973	NONE	N/A	EDUCATIONAL GRANT	12,500
Lauren Pike2168 Carol View Dr 214 CARDIFF,CA 92007	NONE	N/A	EDUCATIONAL GRANT	2,500
Danielle Paiva4555 Vandever Ave 20B SAN DIEGO,CA 92120	NONE	N/A	EDUCATIONAL GRANT	22,000
Matthew Blase1718 Hanson Lane RAMONA,CA 92065	NONE	N/A	EDUCATIONAL GRANT	12,500
Michael Solomon13326 Bavarian Drive SAN DIEGO,CA 92129	NONE	N/A	EDUCATIONAL GRANT	22,500
MEREDITH BEAT5190 Espinoza Road El Cajon,CA 92021	NONE	N/A	EDUCATIONAL GRANT	30,500
Danielle Solomon13326 Bavarian Drive SAN DIEGO,CA 92129	NONE	N/A	EDUCATIONAL GRANT	12,000
Total  3a				262,309

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Pro Kids Golf Academy Inc4085 52ND STREET SAN DIEGO,CA 92105	N/A	PUBLIC	TO PROVIDE ASSISTANCE FOR UNDERPRIVILEGED CHILDREN TO DEVELOP SKILLS AND LIFE VALUES	60,000
JASON PECK2168 Carol View Drive 214 Cardiff,CA 92007	NONE	N/A	EDUCATIONAL GRANT	9,000
Total  3a				262,309

TY 2009 Accounting Fees Schedule**Name:** THE BRADLEY FOUNDATION**EIN:** 33-0771070**Software ID:** 09000047**Software Version:** 2009v1.3

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION	1,669	0	0	1,669

**TY 2009 Investments Corporate
Stock Schedule****Name:** THE BRADLEY FOUNDATION**EIN:** 33-0771070**Software ID:** 09000047**Software Version:** 2009v1.3

Name of Stock	End of Year Book Value	End of Year Fair Market Value
4027 SH. UNION PACIFIC CORP	241,594	257,325
4162 SH. JP MORGAN CHASE	176,811	173,431
100 SH. INTERNATIONAL ROYALTY	610	716
10 SH. CA WATER SERVICE GROUP	363	368
7832 SH. INTEL CORP	145,607	159,773
7412 SH. NBTY INC	202,413	322,718
26,021 SH. PARKER DRILLING CO	215,885	128,804
13,900 SH. PACER INTL INC TENN	156,001	43,924
12,188 SH. HEALTHSPRING INC	225,493	214,631
6,252 SH. CASH AMERICA INTL	211,004	218,570
13,450 SH. JABIL CIRCUIT INC	281,146	233,627
8,877 SH. AMERICAN EAGLE OUTFITTERS	220,622	150,731
3,900 SH. AMGEN INC	227,541	220,623
4,212 SH. ALLSTATE CORP	218,997	126,528
5,835 SH. FOREST LABS INC	221,582	187,362
16,616 SH. VISHAY INTERTECHNOLOGY INC	219,256	138,743

TY 2009 Investments Government Obligations Schedule

Name: THE BRADLEY FOUNDATION

EIN: 33-0771070

Software ID: 09000047

Software Version: 2009v1.3

**US Government Securities - End of
Year Book Value:**

**US Government Securities - End of
Year Fair Market Value:**

**State & Local Government
Securities - End of Year Book
Value:**

494,396

**State & Local Government
Securities - End of Year Fair
Market Value:**

484,194

TY 2009 Investments - Other Schedule

Name: THE BRADLEY FOUNDATION

EIN: 33-0771070

Software ID: 09000047

Software Version: 2009v1.3

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
36.14 SH. SCHWAB DIVIDEND EQUITY	FMV	516	436
10 SH. MARKET VECTORS ETF TRUST	FMV	428	361

TY 2009 Legal Fees Schedule

Name: THE BRADLEY FOUNDATION

EIN: 33-0771070

Software ID: 09000047

Software Version: 2009v1.3

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	90	0	0	90

TY 2009 Other Assets Schedule

Name: THE BRADLEY FOUNDATION

EIN: 33-0771070

Software ID: 09000047

Software Version: 2009v1.3

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
COLLECTIBLES HELD FOR DONATION	299,800	299,800	299,800

TY 2009 Other Expenses Schedule**Name:** THE BRADLEY FOUNDATION**EIN:** 33-0771070**Software ID:** 09000047**Software Version:** 2009v1.3

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
POSTAGE	67			67
OFFICE SUPPLIES	1			1
INTERNET EXPENSE	303			303
CHARITABLE EVENT FOR HANDICAP CHILDREN	13,381			13,381
BANK SERVICE CHARGES	30			30

TY 2009 Other Professional Fees Schedule

Name: THE BRADLEY FOUNDATION

EIN: 33-0771070

Software ID: 09000047

Software Version: 2009v1.3

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVISORY FEES	13,810	13,810	13,810	0

TY 2009 Substantial Contributors Schedule

Name: THE BRADLEY FOUNDATION

EIN: 33-0771070

Software ID: 09000047

Software Version: 2009v1.3

Name	Address
APACHE FOUNDATION	2000 POST OAK BLVD HOUSTON,TX 77056

TY 2009 Taxes Schedule

Name: THE BRADLEY FOUNDATION

EIN: 33-0771070

Software ID: 09000047

Software Version: 2009v1.3

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE FILING FEES	30			30
SEC 4940 TAX PAID ON NET INVESTMENT INC	899			